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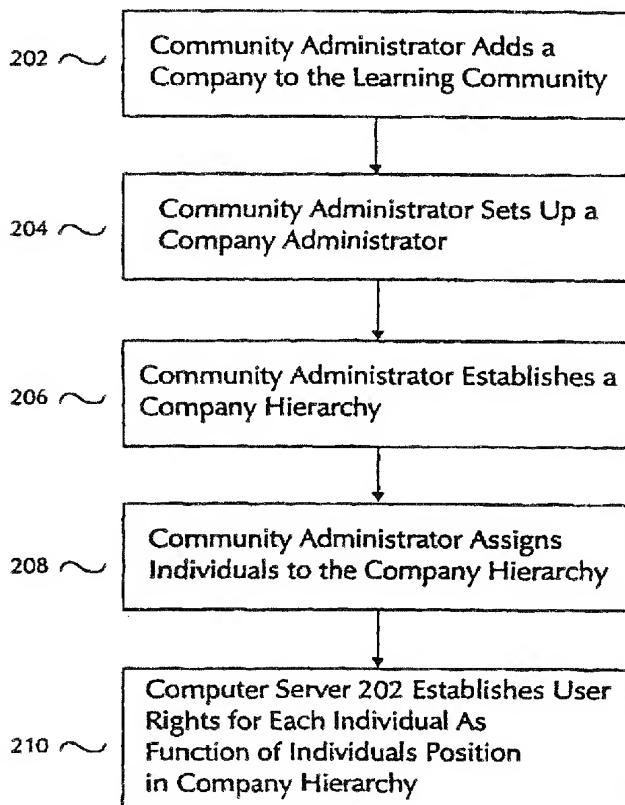
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[Continued on next page]

(54) Title: METHOD AND SYSTEM FOR IMPLEMENTING A LEARNING COMMUNITY



(57) Abstract: Method and system for implementing a learning community via a computer network are provided. An administrator defines a community of companies. User rights are then established for each individual within each company making up the learning community. User rights may be established automatically as a function of each individual's position in his company's company hierarchy. Training materials are provided to the individuals via a computer network as a function of each individual's user rights.

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**METHOD AND SYSTEM FOR IMPLEMENTING A LEARNING COMMUNITY****Cross-Reference To Related Applications**

5 This application claims the benefit of U.S. Patent Application Serial No. 09/608,326, filed June 30, 2000, which claims the benefit, under 35 U.S.C. § 119(e), of U. S. Provisional Patent Application Serial No. 60/156,998, filed October 1, 1999.

**Field Of The Invention**

10 The present invention relates to a method and system for implementing a learning community to provide training. More particularly, the present invention relates to a method and system for implementing a learning community wherein training materials are provided to individuals via a communication network in accordance with pre-defined user rights.

**Background Of The Invention**

Adequate information and training is crucial for success in the corporate world. It is difficult for a company to compete to its full capacity in today's fast and ultra-competitive marketplace without a means of ensuring that all of its officers, managers, salespeople and other personnel have the proper knowledge and training. Companies have economic incentives to ensure that not only are their own personnel well-trained, but also that the personnel of its business partners are well-trained. Thus, the incentive is to ensure that the people who make, sell, etc., their products or services are as knowledgeable as possible to enhance sales. A manufacturer has an incentive to ensure that not only its own employees are knowledgeable about its products, but also that the personnel of the retailers that sell the products are knowledgeable about the products. Although these are simple concepts to understand, the complexity lies in satisfying this training need. Training a significant number of individuals in a large company is a formidable task that typically requires a significant investment in personnel, resources, time and money.

Some companies have sought to address their training needs by instituting traditional classroom-based training methods. Typically, a company hires instructors or its more knowledgeable personnel to personally teach material to people in a classroom setting, similar to the way students receive education in conventional academic schools. Although effective to some degree, there are many disadvantages and limitations to classroom-based training methods of this type. First, the recipients of this type of training must be present in the classroom to learn the material. This may involve taking a day off from their regular work assignment to attend the

class, imposing costs on the company in the form of reduced man power, reduced productivity, or additional labor costs required to make up for the attendees' missed working time. Second, there are costs associated with hiring the instructor. The company must either bear the service costs of outside instructors or make up for the missed working time of personnel who teach the class. All 5 of these costs inevitably lead to a third problem, which is synchronizing the schedules of all of the potential class attendees. Due to the high costs associated with hiring the instructor and setting aside space for the classroom, it is usually most cost-effective to have as many people as possible attend each class. Assuming that the company is fairly large, synchronizing the schedules for all 10 of the individuals within the company that need to be trained may require dedicating personnel to managing the coordination of training and work schedules. In addition, it may be necessary to dedicate other personnel to manage the education that each individual within the company has received to each individual is receiving adequate training in the appropriate areas. Finally, there 15 may be travel costs associated with classroom based instruction. For example, a manufacturer wishing to train the personnel of retailers who sell its products may need to send instructors great distances in order to train the personnel of remotely located retailers. These are just some of the problems associated with classroom-based training.

As an alternative, more and more companies are turning to computer-based training methods as a means for balancing the need to train their personnel against the ever-increasing costs of meeting such training needs. In the past, computer-based training involved installing 20 individual software packages on stand-alone computers (i.e., computers not connected to a network) with no means of monitoring the usage or performance of the individuals taking the class. In addition, implementing new training software typically required a software support person to go to each stand-alone computer and install the new training software. Companies would then have to manually track the computers and the software to ensure that all of the 25 training software was up-to-date and functioning properly. The significant management and overhead costs associated with this method reduce the attractiveness of this type of computer-based training as a means of satisfying a company's training requirements.

Today, however, the ubiquity of networks, intranets and the Internet (collectively referred to herein as "net-based technology") has made computer-based training a realistic and cost-effective option. Net-based technology allows for remote and centralized software distribution 30 and maintenance, thereby significantly reducing training costs. In addition, net-based technology also allows a company to efficiently and centrally monitor usage and performance. Several companies offer variations of net-based technology training options including PATHLORE, ALLEN COMMUNICATION, and LOTUS DEVELOPMENT CORPORATION. Although all

of the net-based training systems offered by these companies apparently allow a company to centrally manage, administer and monitor computer-based training programs using net-based technology, they all seem to have merely taken the classroom-based training model and implemented that model using net-based technology. Thus, to various degrees, they all group  
5 individuals into a single class that shares common training needs to determine the training materials to administer to that class.

In addition, most of the various training solutions offered by these companies are implemented on a stand-alone company basis instead of using a multi-company or inter-company model. Thus, Company A may administer and monitor its own training materials for its own  
10 personnel on a website, and Company B may administer and monitor its own training materials for its own personnel on the same website. However, none of the various training solutions currently available allows Company A to administer its training materials to individuals within Company B while also allowing Company B to monitor its own personnel's use of Company A's training materials. Furthermore, Company C may want to administer its training materials to both its own  
15 personnel and Company B's personnel, but not to any of the individuals within Company A. Company C may further want to monitor the performance on its training materials of both its own personnel and Company B's personnel. Company B may also want to monitor its own personnel's performance on Company C's training materials. However, Company B may not want Company C to monitor the usage and performance of Company B's personnel on training  
20 materials not administered by Company C.

Finally, most of the training solutions offered by these companies do not allow for selective distribution of training materials to the individuals within the company in accordance with the locations of such individuals in a company hierarchy. For instance, a company may desire that individuals within Division A of the company have access to certain training materials,  
25 but not individuals within Division B. Alternatively, the company may desire that only individuals within Department A of Division B to have access to certain training materials.

None of the currently available training solutions provides a solution that meets all of these training needs. These inadequacies of the currently available training solutions are addressed by the present invention.

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### Summary Of The Invention

The present invention is a method and system for administering and providing training materials to individuals within one or more companies through a communication network such as, for example, a computer network. The method includes the steps of forming a community of

companies having access to shared training materials and regulating the access to such materials by individual companies within the community. The method also includes assigning user rights to at least one individual within a company and distributing materials to that individual based on those user rights. In one embodiment, any company within the community may unilaterally add 5 additional training materials to the set of training materials shared by the community.

In another embodiment, the method according to the present invention is a method of operating a computer system having a data processor coupled to a means for data storage. The method permits the provision of training materials to an individual within a company where the individual is at a certain level within the company hierarchy and has a training history including 10 exam results. The method has the steps of recording information relating to the individual's training history in the data storage means and recording information relating to the individual's level within the company and computing based upon both sets of information whether to grant the individual access to various training materials.

The invention in another embodiment consists of a computer system for administering 15 shared training materials to individuals within one or more companies. The system has communication means for communication among companies with access to such materials, assignment means for assigning user rights to individuals and distribution means for distributing such materials to individuals based on their user rights.

In another embodiment, the invention consists of a function such as, for example, 20 computer readable media for instructing a computer to perform the steps of forming a community of companies having access to shared training materials, regulating the access of companies within the community to such materials, assigning user rights to individuals within the companies and distributing such materials to individuals based on their user rights.

In another embodiment, the method according to the present invention is a method of 25 permitting an individual within a company to access training materials. The method allows multiple companies to share a common set of training materials while restricting access to particular training materials to particular individuals within particular companies. The method has the steps of recording in a data storage device rules relating to the company's right to access the training materials, recording in a data storage device rules relating to the individual's right to 30 access the training materials, and determining based upon both sets of rules whether to grant the individual access to various training materials.

In another embodiment, the invention consists of a computer system for providing training lessons to an individual within one or more companies. The system has a data storage device containing information about the individual's level within the company and containing one or

more training lessons, and a computing device for determining whether to grant the individual access to the training lessons based on the individual's level within the company.

### Brief Description Of The Drawings

5 Fig. 1 is a schematic diagram of the relationship between hardware devices in the preferred embodiment of the present invention.

Fig. 2 is a flowchart depicting the steps involved in establishing user rights for individuals as a function of their position in the corporate hierarchy.

10 Fig. 3 is a table comparing the user rights of different level individuals of a company in the preferred embodiment of the present invention.

Fig. 4 is a flowchart depicting the steps involved in transferring a training lesson to a learning community.

15 Fig. 5 is a flowchart depicting the steps involved in adding a training lesson to a company curriculum, in assigning a training lesson to an individual, and in an individual gaining access to a training lesson.

Fig. 6 is a flow chart illustrating the process in the preferred embodiment of the present invention for determining whether to grant or deny a request to run a report regarding the training history of an individual.

### 20 Detailed Description Of The Invention

The present invention relates to a method and system for implementing a learning community wherein training materials are provided to individuals through a communication network such as, for example, a computer network in accordance with pre-defined user rights.

25 The term "company" as used herein means any corporation, limited liability company, limited liability partnership, general partnership, or any other form of organization.

The term "level" as used herein means the hierachial categories of sections into which a particular company is divided. Levels may be imposed for purposes of training only or levels may reflect the actual hierarchy of the company. For instance, a particular company might have four different levels, namely, divisions, regions within each division, sites within each region, and 30 departments within each site. Of course, those of ordinary skill in the art will appreciate that there are many different levels into which a company may be divided consistent with the scope of the present invention.

The term "training history" as used herein means information regarding the particular training lessons taken by an individual, and may include the scores earned on tests, relevant dates,

and any other information regarding that individual's exposure to and performance on training lessons.

The term "user rights" as used herein means rights which determine what activities a user can perform within the learning community, and include for example what training materials and 5 other materials a user has access to. The term "rules" as used herein means the guidelines based upon which user rights are established.

The present invention is based on the Vertical Learning Community Model and involves a learning community, which is a group made up of companies sharing common training materials accessed through a common server. These companies each have varying degrees of access to the 10 training materials provided through the common server. Each company in turn determines which of the company's training materials shall be accessible to which individuals within the company. The degree of access of each company and of each of the individuals within each company to such 15 training materials is determined by a set of user rights. These user rights, which will be further discussed below, permit differential access to training materials among individuals of different levels within a single company and permits differential access among the group of companies or their divisions to such material. Hence, the Vertical Learning Community Model can for example permit one company to access the training materials of another company within the learning 20 community, while at the same time distinguishing between the personnel of the two companies. It will be appreciated by those of ordinary skill in the art that training materials may include lessons, tests, other learning material or some combination of them.

Fig. 1 is a schematic diagram of the relationship between hardware devices in an exemplary embodiment of the present invention. It illustrates a computer server 102 connected to a network communications medium 114 via a first communications device 112. The computer server 102 may have a processor 104, a storage device 106, a user input device 108 and, 25 optionally, a display device 110. The network communications medium 114 may comprise any computer network (e.g.: internal company networks such as intranets, the Internet, etc.). A first computer client 116 is also connected to the network communications medium 114 via a second communications device 126. The first computer client 116 may have a processor 118, a storage device 120, a user input device 122, and a display device 124. A second computer client 128 may 30 also be connected to the network communications medium 114 via a third communications device 138. The second computer client 128 may have a processor 130, a user input device 134, and a display device 136. The first, second and third communications devices 112, 126, 138 may include a modem, network interface card, communications port, etc. However, those of ordinary skill in the art will understand that other devices which allow the computer server 102, and first

and second computer clients 116, 128 to communicate via the network communications medium 114 may also be used within the scope of the present invention. Further, those of ordinary skill in the art will understand that while only two computer clients have been depicted in the exemplary embodiment for the sake of simplicity, additional computer clients may be connected to the  
5 network communications medium 114 in accordance with the present invention. Finally, those of ordinary skill in the art will understand that these computer clients may be individuals who are all associated with the same company or, alternatively, who are associated with different companies within the same learning community.

The computer server 102 may be a PC, Mac, mainframe or other similar computer device  
10 running software to store, retrieve and process data and data requests. For example, the computer server 102 may be, for example, a COMPAQ Server running, for example, WINDOWS 2000 Information Server® and using, for example, ORACLE 8i® for database storage and retrieval. In addition, the first and second computer clients 116, 128 may each be a PC, Mac or similar computer device. The first and second computer clients 116, 128 may each be running a  
15 graphical user interface on an operating system such as, for example, WINDOWS®, Linux, etc., and also running a browser that enables a user to access and view content over the Internet. The protocols may include, but are not limited to, HTML, XML, JSP and Enterprise Java Beans. Those of ordinary skill in the art will know that other hardware and software may be used without departing from the scope of the present invention.

20 Fig. 2 is a flowchart depicting the steps involved in carrying out an embodiment of the present invention. Fig. 2 at 202 refers to a community administrator who manages the training activity for the learning community. The community administrator may, for example, be the provider and/or manager of the common computer server 102 serving the different companies of the learning community. The community administrator manages the training activity for the entire  
25 learning community. In one embodiment of the present invention, consistent with his function as the manager of training activity for the entire learning community, the community administrator's action would overrule the actions of all other users within the learning community. For example, the community administrator could overrule a decision by a company to allow a particular user to have access to particular training materials. It will be appreciated by those of ordinary skill in the  
30 art that the community administrator may be an individual or an entity such as a company, and furthermore that there may be more than one community administrator.

Referring to Fig. 2, the community administrator at 202 adds a company to the learning community by interacting with the computer server 102 directly, or alternatively, by logging onto the computer server 102 using a computer client connected to the computer server 102 via the

network communications medium 114 to interact with the computer server 102 indirectly. In one embodiment, the addition of the company to the learning community entails using the software running on the computer server 102 to enter identifying data regarding the company (e.g.: the name of the company, the addresses of the company, the name of the contact person, etc.)

5 through an appropriate interface such as, for example, an on-screen field. A field is an area on a computer screen or other vehicle designated for the input of information, for example in the form of text or graphics, and their use is known to those of ordinary skill in the art.

At 204 of Fig. 2, the community administrator designates a company administrator on the computer server 102 for each company. The company administrator in turn manages the training 10 activity for the company. Again, the community administrator may manage such activity by interacting with the computer server 102 directly, or by using a computer client to log onto the computer server 102 to interact with it indirectly. The designation of a company administrator involves assigning a unique administrator identification ("ID") to the company administrator using the software running on the computer server 102, and associating particular user rights with the 15 company administrator, as shown in Figure 3. User rights refer to the user's ability to access training materials and other materials on the network and to perform certain functions within the learning community.

At 206 of Fig. 2, the company administrator establishes a company hierarchy for the company. The company hierarchy is simply the company organized into levels, and such levels 20 may reflect the actual organizational scheme of the company, but need not. The different levels of the company hierarchy may include, for example, divisions, regions, sites and departments. For example, a company may have a sporting goods division. This division, along with all the other divisions, would occupy one level of the company hierarchy. Within the sporting goods division, the company may further have a Northeast region, a Southeast region, a Northwest region and a 25 Southwest region. Together, all of the regions would occupy a second level in the company hierarchy. The company may further have a New York site in the Northeast region, a Georgia site in the Southeast region, etc. Together, all of the sites in all of the regions would occupy a third level of the company hierarchy. Finally, the company may have an athletic shoe department in some or all of the sites in each region. Together, all of the departments in all of the sites would 30 occupy a forth level.

In one embodiment of the present invention, the company administrator may select which levels to include in the company hierarchy by, for example, using a computer client to log onto the computer server 102 and clicking on the desired levels (e.g.: divisions, regions, sites, or departments) as listed in, for example, on-screen pull-down windows, the use of which is known

to those of ordinary skill in the art. The company administrator enters descriptive data for each division, region, site and department (e.g.: the name of each division, the mailing addresses of each division, the name of the contact person for each division, etc.) through an appropriate interface such as, for example, an on-screen field. For example, the company administrator may 5 name one region the Northwest region, establishing a mailing address and contact person for that region, and may name another region the Southeast region, establishing a different mailing address and different contact person for that region.

In an embodiment of the present invention, the company administrator may also include ad-hoc groups within the company hierarchy. Ad-hoc groups are custom-made groups of 10 individuals within a company that the company administrator chooses to associate together. For example, the company administrator may want to assign particular training lessons to all individuals involved in a particular project. However, such individuals may otherwise be unassociated with one another through already existing levels in the company hierarchy. To facilitate the assignment of training lessons relevant to the project to the relevant individuals 15 within the company, the company administrator may choose to create an ad-hoc group consisting of all the individuals involved in that project. Such a group could then be assigned to the same level for purposes of training. The company administrator may define such ad-hoc groups by, for example, clicking on particular individuals within the company as listed in an on-screen window and then clicking on an appropriately labeled on-screen button to add them to the ad-hoc group.

20 In one embodiment of the present invention, referring again to Fig. 2, once the company administrator has established the company hierarchy at 206, the company administrator assigns individuals to the company hierarchy at 208 by using a computer client to log onto the computer server 102 and associating each individual with one or more divisions, regions, sites, departments or ad-hoc groups. In assigning an individual to the company hierarchy, the company 25 administrator can distinguish between company administrators, managers, and employees. For example, the company administrator of a company may assign, for example, a manager and an employee to the cosmetics department in the Northeast region's New York site. The company administrator would occupy a higher position in the company hierarchy than the manager, who would occupy a higher position than the employee. The assignment of individuals to the company 30 hierarchy may reflect the actual hierarchy of the company, but need not. Furthermore, a single individual can be assigned to the company hierarchy of more than one company.

In one embodiment of the present invention, based upon the assignment of individuals to the company hierarchy, the computer server 102 automatically establishes user rights particular to each individual. These user rights are rights which determine what activities a user can perform

within the system, including for example what materials a user has access to. The user rights are based on rules about which individuals within a company have which kinds of access. The user rights may follow a hierarchy which mirrors the company hierarchy. For example, an administrator possesses greater user rights than a manager, who possesses greater user rights than  
5 an employee.

Furthermore, in one embodiment of the present invention, each individual's user rights would be effective only within the department, site, region or division of the company hierarchy to which that individual has been assigned. For example, a manager who has been assigned to the Northeast region of the company hierarchy would possess user rights effective only within such  
10 Northeast region. Hence, the manager would, for example, be able to assign training lessons (a user right explained in greater detail below) to all managers and employees within the Northeast region (which includes all managers and employees within all departments within all sites within the Northeast region), but would not be able to assign lessons to any other individuals within the company hierarchy. Similarly, a manager who has been assigned to the New York site of the  
15 Northeast region would be able to assign lessons to all managers and employees within the New York site, but would not be able to assign lessons to any other individuals within the Northeast region, nor to any other individuals within the company hierarchy. An exemplary establishment of user rights is illustrated in table form in Fig. 3. Of course, assigning individuals to the company hierarchy establishes only default user rights, and the company administrator may within the scope  
20 of the present invention choose to grant any particular individual more or fewer rights than the default rights. Referring again to Fig. 3, this could be done by using a computer client to log onto the computer server 102 and associating particular user rights with an individual.

Training lessons may be in the form of, for example, text, graphics or sound conveying information regarding the subject matter of the lesson. Tests or exams may also be in the form of,  
25 for example, text, graphics or sound presenting questions regarding the subject matter of particular lessons, and may include interfaces such as, for example, on-screen fields through which users may mark or enter their answers to said questions. The development of training lessons is described in further detail below.

In one embodiment of the present invention, each company in the learning community has  
30 its own company curriculum consisting of all of the training lessons that may be assigned to individuals within that company. Only those training lessons that have been assigned to a particular individual may be accessed by that individual. The addition of training lessons to the company curriculum and the assigning of training lessons to particular individuals are explained in greater detail below.

In one embodiment of the present invention, the company administrator can choose to add lessons to the company curriculum from a list of training lessons. The list of training lessons may come from one of two sources. First, training lessons may be obtained from a universal curriculum consisting of a pool of generic training lessons maintained by the community administrator on behalf of all companies within the community. These generic training lessons may have been created or developed by the community administrator or, alternatively, these generic training lessons may be developed by an entity that is unaffiliated with the company, but which has made the training lesson available to all of the companies in the learning community.

Second, training lessons may be developed specifically for the company by the company itself or by a separate entity on the company's behalf. Referring to Fig. 4, an individual would request from the company administrator the right to develop a training lesson for the company at 402. The requester may be the company administrator himself, a manager of the company, an employee of the company, or may be an individual otherwise unassociated with the company. For instance, the requester may be an individual within a company that specializes in developing training lessons for other companies. The computer server 102 would at 404 make a determination as to whether the company administrator has the right to grant the right to develop training lessons. Such right to grant the right to develop training lessons may be contingent on, for example, whether required fees have been paid, whether the company with which the company administrator is affiliated is a member of good standing in the learning community, etc. In the event the company administrator does not have the right to grant the right to develop training lessons, the requester would have its request to develop training lessons denied at 406. In the event the company administrator has the right to do so, the company administrator may at 408 grant the requesting individual the right to develop a training lesson for the company by assigning developer rights to that individual. Only an individual which has been granted the right to develop a training lesson for the company by the company administrator at 408 will be permitted to develop a training lesson for the company at 412. Otherwise, the individual's request to develop would be denied at 410.

In an embodiment of the present invention, referring again to Fig. 4, training lessons may be developed at 412 in the form of, for example, web pages (including but not limited to content such as HTML, JPEG, GIF, XML, etc.) or files that may be downloaded from web pages. Training lessons in the form of web pages may be developed with the aid of commercial web page production software such as, for example, FrontPage, Dreamweaver, etc., using techniques well known to those of ordinary skill in the art. In one embodiment of the present invention, the developer can specify a date on which a particular training lesson shall expire (i.e., be

automatically removed from or be ineligible to be placed on the company curriculum of a particular company) by entering the date through an appropriate interface such as an on-screen field.

In an embodiment of the present invention, referring again to Fig. 4, the individual who developed the training lesson at 412 establishes at 414 which companies will have access to the training lesson. The developer may do this in two stages. First, the developer either limits the target audience for the training lesson to an internal audience made up of individuals within the company with which the developer is affiliated by, for example, clicking on one appropriately labeled on-screen button, or the developer selects an external audience, thereby allowing for the possibility that individuals within other companies may have access to the training lesson, by clicking on a different appropriately labeled on-screen button. Second, to the extent applicable, the developer defines the internal and external target audiences. If an internal target audience is selected, the developer determines who within the company may have access to the training lesson by, for example, clicking on one or more individuals, departments, sites, regions, divisions or ad-hoc groups as listed in an on-screen window and then clicking on an appropriately labeled on-screen button to add them to the internal audience. A user previously granted access may similarly have his access revoked by, for example, selecting the user from a list of the internal audience as displayed in an on-screen window and then clicking on an appropriately labeled on-screen button to remove him from the internal audience. If an external target audience is selected, the developer determines which other companies in particular may have access to the training lesson by, for example, clicking on particular companies as listed in an on-screen window and then clicking on an appropriately labeled on-screen button to add them to the external audience. A company granted access may similarly have its access revoked by, for example, selecting the company from a list of the external audience as displayed in an on-screen window and then clicking on an appropriately labeled button to remove it from the external audience.

Referring again to Fig. 4, following the selection of those who may have access to the training lesson, the developer of the training lesson transfers at 416 the training lesson to the computer server 102. Transfer of the training lesson to the computer server 102 may be accomplished, for example, via a network communications medium 114, such as the Internet. Transfer of the training lesson to the computer server 102 may also be accomplished, for example, by transferring the training lesson via an intermediary storage medium (e.g.: a floppy disk, a compact disk, etc.) to the community administrator, who would in turn transfer the training lesson from the intermediate storage medium to the computer server 102. Once the training lesson has been transferred to the computer server 102, it is available to be added to a company curriculum.

This aspect of the invention represents a benefit over training systems existing in the prior art in that any company within the learning community may unilaterally add training materials to the set of training materials shared by the community.

In one embodiment of the present invention, whether a training lesson is one that has been selected from the universal curriculum or is one that its developer has specifically chosen to make available to the company, it must be added to the company curriculum before it can be assigned to individuals within that company. Referring to Fig. 5, for each company requesting at 502 that the training lesson be added to its company curriculum, the software running on the computer server 102 will at 504 make a determination as to whether certain predefined conditions are satisfied. These predefined conditions may include, for example, a determination that the company has been authorized to add the training lesson to its company curriculum upon, for example, the payment of required fees or verification that the company is a member of good standing in the learning community, etc. If the predefined conditions are satisfied, the company administrator will be granted the right to add the training lesson to its company curriculum. This aspect of the invention provides a benefit over training systems existing in the prior art in that, by choosing to add or not add particular training lessons to its company curriculum, each company within the learning community can determine which training lessons shall be accessible to individuals within the company.

In one embodiment of the present invention, in regard to training lessons selected from the universal curriculum, such lesson can be added to the company curriculum by, for example, selecting the lesson from the universal curriculum list as displayed in an on-screen window and then clicking on an appropriately labeled on-screen button. With respect to training lessons that are not part of the universal curriculum but in regard to which the company administrator has been granted the right to add the lesson to the company curriculum, the company administrator can add one of the lessons to the company curriculum by, for example, selecting the lesson from a list as displayed in an on-screen window and then clicking on an appropriately labeled on-screen button.

In one embodiment of the present invention, referring again to Fig. 5, once a training lesson has been added to the company curriculum of a particular company, that training lesson must still be assigned at 510 in order for an individual within the company to actually take the lesson. Only company administrators and managers may assign training lessons, and only to individuals within the company who are at their level or lower in the company hierarchy. For example, a manager who has been assigned to a company's New York site would be able to assign lessons to all managers and employees within the New York site, but would not be able to

assign lessons to any administrators, nor to any managers or employees outside the New York site.

In one embodiment of the present invention, the first step in assigning training lessons is to determine which training lessons to include in an assignment. The assignor determines which 5 training lessons to include in an assignment by selecting a training lesson from the company curriculum for example by selecting a lesson listed in an on-screen window and then clicking on an appropriately labeled button to include the lesson in the assignment. On a separate screen, once the training lessons have been selected, a priority level for each of the training lessons may be established by, for example, selecting a priority level (e.g.: low, medium or high) a list as 10 displayed in an on-screen window, and a completion date for each of the training lessons may be established by, for example, entering such date in an appropriately labeled on-screen field.

Next, the assignor determines who will receive the assignment by, for example, clicking on one or more individuals, departments, sites, regions, divisions, or ad-hoc groups as listed in an on-screen window and then clicking on an appropriately labeled button to add them to the 15 group of designated recipients of the assignment. On a separate screen, the assignor may then review which training lessons have been included in the assignment and who in the company has been designated to receive the assignment. The assignor may furthermore choose to edit the choices by clicking on an appropriately labeled link which allows him to revisit the processes described above through which the choices were made.

20 In one embodiment of the present invention, the company administrator may also establish certain prerequisites that must be satisfied before an individual within the company will have access to a particular training lesson. Hence, even though a particular individual may have been assigned the training lesson at 518, such individual attempting to access such lesson at 520 will fail to obtain such access unless these prerequisites are satisfied at 522. For example, the 25 company administrator may establish that an individual will not be permitted to take a particular training lesson until he has taken certain pre-requisite training lessons. The assignor determines which training lessons shall serve as prerequisites for another training lesson by, for example, selecting one or more training lessons from the company curriculum list as displayed in an on-screen window and then clicking on an appropriately labeled button. If all prerequisites to an 30 assigned training lesson are satisfied at 522, the computer server 102 would finally allow the individual access to the training lesson at 526. Such individual could then access the training lesson through a computer terminal such as, for example, first and second computer clients 116, 128 of Fig. 2.

Pursuant to the enforcement of such prerequisite requirements, in one embodiment of the present invention, referring to Fig. 6, the computer server 102 may at 602 store data regarding the training history of each individual in the company. Moreover, the computer server 102 may accumulate such data regarding the training history of a particular individual over the course of 5 his lifetime, with such transcript continuing to be associated with the same individual even if the individual moves from company to company. Such training history databases are developed and maintained with the aid of commercial database software such as, for example, Microsoft SQL, etc., using techniques known to those of ordinary skill in the art.

Referring again to Fig. 6, the computer server 102 may at 604 receive a request for a 10 report on the data stored in regard to a particular individual's training history. Reports may be produced by using, for example, Crystal Reports 7.0 to access the training history data stored and generate the report therefrom. The process for either granting or denying a request to run a report in one embodiment of the present invention is illustrated in flowchart form at 606-618. As 15 illustrated in Figure 6, absent the consent of the individual to whom the report pertains, a particular company could only run reports based on training history which pertains to that company's training material. For example, if an individual has completed training lessons assigned by Company A and training lessons assigned by Company B, absent the consent of the individual, Company A could only run reports based on the individual's performance on Company A's training material. The individual could, however, grant Company A the right to run reports based 20 on the individual's performance on Company B's training material as well. The individual could grant such consent by, for example, choosing Company B from a list of companies whose training material the individual has been assigned as displayed in a pull-down window, and then clicking on an appropriately labeled button to add it to the list of companies in regard to whose training material Company A may run reports based on the individual's performance thereon.

25 Referring again to Figure 6, only those individuals within a company who are determined to have been granted the right to run reports at 606 will have such requests honored at 618. An individual's capacity to grant such rights is a function of his position in the company hierarchy as established at 206 of Fig. 2. More particularly, only administrators and managers could grant the right to run reports to other individuals in the company, and they could grant rights only to those 30 individuals who occupy equivalent or lower levels on the company hierarchy. For example, a manager who has been assigned to a company's New York site would be able to grant the right to run reports to all managers and employees within the New York site, but would not be able to do so to any administrators, nor to any managers or employees outside the New York site.

Furthermore, once an individual has been granted the right to run reports, that individual may run

reports only for those individuals who occupy equivalent or lower levels on the company hierarchy. For example, a manager who has been assigned to a company's New York site would be able to run reports for all managers and employees within the New York site, but would not be able to run reports for any administrators, nor for any managers or employees outside the New York site.

5

Referring again to Figure 6, note that in addition to running reports on the training history of individuals within a particular Company A, individuals of Company A could be granted the right to run reports on the training history of individuals of other companies to the extent the report regards Company A's training materials. Thus, for example, Manufacturer A may require 10 that Retailer Z's salespersons take training lessons regarding Manufacturer A's products. In such an instance, a manager in Manufacturer A may run a report on the performance of salespersons in Retailer Z, but only as regards performance on Manufacturer A's training materials.

10

In an alternative embodiment of the present invention, training history may be presented in many different formats to address various needs. More particularly, training history may be 15 organized in various categories, such as by individual, by department, by site, by region, by division, by ad-hoc group, by company, etc. For example, a manufacturer may want to run reports comparing the performance on training material tests of various test takers, including test takers employed by different retailers that sell the manufacturer's products. This may be done to gauge which retailers are the most knowledgeable, and to adjust distribution schemes to favor 20 such retailers. As another example, a retailer with stores in different regions may want to run reports comparing performance among test takers within the different regions to determine if they need to intensify training or recruitment efforts in a particular region. Of course, training history as recorded in such reports may be organized in many other ways without departing from the scope of the present invention.

25

One of the benefits present invention is that, in establishing user rights for individuals within the companies that make up the learning community, it allows for the regulation of access to a particular set of training materials on at least two levels. First, the present invention allows for the regulation of the access of a particular company to the training materials. For example, as discussed above, the present invention may regulate a company's access to training materials by 30 requiring at 504 that certain pre-defined conditions be satisfied before that company will be permitted to add a training lesson to its company curriculum. Second, the present invention allows each company to control an individual's access to the materials that the company has access to. For example, as discussed above, each company may regulate an individual's access to those training lessons which the company has been permitted to place on its company curriculum

by requiring that the training lesson be assigned at 518 and that certain pre-defined conditions be satisfied at 522 before the individual will be permitted to take a training lesson. In this way, the present invention represents a substantial improvement over the prior art in that, while the prior art may teach the first level of regulation, namely the regulation of a particular company's access 5 to a particular set of training materials, Applicant knows of nothing in the prior art which teaches the second level of regulation, namely the regulation by said company of the access of individuals within it to the training materials to which the company has access.

In one embodiment of the present invention, comments may be added to training lessons which would be displayed upon accessing the training lesson and would precede the text and 10 graphics of the lesson. Such comments might, for example, explain a training lesson's relevance to the long-term goals of a company. Comments can be added or edited, for example, in one of two ways. First, comments may be added or edited by the company administrator at the time the company curriculum is created or edited. Upon clicking on an appropriately labeled link, the company administrator would be presented with an on-screen field, and he could then add or edit 15 a comment to the training lesson by entering text in the on-screen field. A comment added to a training lesson in this way would be seen by all those who subsequently take the lesson until such time as the comment is altered or removed. However, the company administrator might also choose to restrict the comment such that only specified individuals see the comment by for example clicking on one or more individuals, departments, sites, regions, divisions, or ad-hoc 20 groups as displayed in an on-screen window and then clicking on an appropriately labeled on-screen button to designate them to receive the comment.

Second, comments may similarly be added to a training lesson at the time a training lesson is assigned by clicking on an appropriately labeled hyper-link. The assignor would then be presented with an on-screen field, and he could then add or edit a comment to the training lesson 25 by entering text in the on-screen field. A comment added to a training lesson in this way would be seen by all those who receive the assignment and subsequently take the lesson. However, the assignor might also choose to restrict the comment such that only specified individuals see the comment by selecting one or more individuals, departments, sites, regions, divisions, or ad-hoc groups from a list as displayed in an on-screen window and then clicking on an appropriately 30 labeled on-screen button to designate them to receive the comment.

In order to comply with Fair Labor Standards Act requirements, companies may be required to provide compensation to personnel for time spent in training programs unless the training program is voluntary. It may be desirable therefore to designate within the training lesson itself whether taking the lesson is mandatory or voluntary. In one embodiment of the present

invention, assignors may designate whether a particular training lesson is mandatory or voluntary by, for example, clicking on the appropriate option (e.g.: mandatory or voluntary) as listed in an on-screen pull-down window corresponding to that lesson, the use of which is known to those of ordinary skill in the art. Such designation would be displayed, for example, upon accessing the  
5 training lesson and would precede the text and graphics of the lesson. It would be seen by all those who receive the lesson. Furthermore, a company that assigns to an individual a training lesson that has been designated as voluntary is unable to generate a report regarding either the individual's performance on the training lesson or whether or not the individual has completed the training lesson.

10 In such instances when companies wish to assign mandatory training lessons, they may wish to set limits on the amount of time that their workers spend taking training lessons during hours outside of the normal workday (i.e.: "off-the-clock"). One embodiment of the present invention allows for the setting of such limits in two steps. First, an individual is precluded from taking a mandatory training lesson during off-the-clock hours unless a company administrator has  
15 designated the lesson as compensable during off-the-clock hours. Second, a budget is set for the individual which specifies the number of off-the-clock minutes that the individual may spend on mandatory training lessons during a particular time period. Such budget may be set by entering in appropriately labeled on-screen fields the start date for the time period, the end date for the time period, and the amount of off-the-clock time as measured in, for example, minutes that the  
20 individual may spend taking mandatory training lessons during that time period. Such budget would be displayed upon accessing any mandatory training lesson and would precede the text and graphics of the lesson. In an alternative embodiment of the invention, the number of off-the-clock minutes spent by an individual on the assigning company's mandatory training lessons and the resulting wage liability incurred by said assigning company would be stored in a database to  
25 facilitate management of the individual's off-the-clock training. Such off-the-clock training databases are developed and maintained with the aid of commercial database software such as, for example, Microsoft SQL, etc., using techniques well known to those of ordinary skill in the art.

30 Preferably, only company administrators and managers may set such budgets, and only in regard to those individuals who occupy equivalent or lower levels on the company hierarchy. For example, a manager could set a budget for another manager or an employee, but could not set a budget for an administrator. Upon the setting of such budget, at the end of each training lesson completed by the individual, the individual would be prompted to indicate in appropriately labeled on-screen fields: 1) whether the lesson was completed during off-the-clock hours, and 2) the actual time in minutes that the lesson took to complete. In the event that the individual has

exceeded his budget, the individual would be prompted with a warning so indicating and those above the individual in the company hierarchy would receive notification that the individual had exceeded his budget. The individual would then be precluded from taking any more mandatory training lessons off-the-clock until and unless his budget is altered by an individual above him in  
5 the company hierarchy.

One embodiment of the present invention also involves providing incentives to individuals for completing the various training lessons. For example, a company administrator may specify that an incentive automatically be awarded upon an individual's completion of one of the company's training lessons. Notification of the award of such incentive may involve the sending  
10 of an e-mail to the individual who was awarded the incentive, as well as to the company administrator. Furthermore, the company administrator may specify that such incentive be in the form of cash, a gift, points, or a raffle entry by making the appropriate selection from an on-screen pull-down window which corresponds to that incentive. In addition, the company administrator may specify that the opportunity to earn such incentive expires on a particular date  
15 by entering such date through an appropriate interface such as, for example, an on-screen field. The expiration date would be displayed upon login by a user on the user's home page. Alternatively, the company administrator could specify that the incentive shall have no expiration date by clicking on an appropriately labeled button.

Alternatively, the incentive may be awarded to individuals as a function of their  
20 performance on a training lesson, as opposed to simply the completion of it. For example, if the training lesson were accompanied by a test or exam, an incentive could be awarded to individuals who achieved above a certain score on the test or exam. Such incentive schemes are merely exemplary, and alternative incentive schemes may be adopted without departing from the scope of the present invention.

One embodiment of the present invention also comprises a means for creating and editing  
25 company news. For example, such news might include the hiring of a new company officer, the achievement of certain sales goals, or a message from management. Company administrators may create company news by, for example, entering in appropriately labeled on-screen fields the headline, author, expiration date, and text of the news. The company news would be displayed  
30 upon login by the user on the user's home page. The company administrator could designate whether the status of the news is active or inactive by making the appropriate selection from a pull-down window, thereby designating whether the news would be seen upon login by those who use the online community in association with the company. Only active news would be seen. The company administrator could also designate the priority of the news by, for example, clicking on

the appropriate priority level (e.g.: low, medium or high) as displayed in an on-screen window. Such designation would accompany the news it describes in greeting those who use the online community in association with the company, thereby alerting such users as to the urgency of any information contained in the news.

5 One embodiment of the present invention also involves using a "spiff" manager. Spiffs are commissions paid directly to retail salespersons by manufacturers to encourage them to sell more product. Spiffs can be awarded in dollar amounts per item sold. Pursuant to the awarding of spiffs, one embodiment of the present invention allows companies to track the number of items of a particular product sold by a particular salesperson. For each item sold, the sales person would  
10 enter in, for example, appropriately labeled on-screen fields information such as, for example, a transaction date, the serial number of the product, and a receipt number. Such databases are developed and maintained with the aid of commercial database software such as, for example, Microsoft SQL, etc., using techniques well known to those of ordinary skill in the art.  
Periodically, the company would award spiffs to the salesperson in accordance with the type and  
15 number of products sold.

In one embodiment of the present invention, revenue is derived in one or more of at least four ways. First, a company can be charged a fee per training lesson it makes available to itself. For example, a company could be charged a fee for each training lesson it transfers to the computer server 102. Second, companies can also be charged a fee for each training lesson they place on their company curriculums. Third, companies can be charged a fee per transaction. For example, companies might be charged a fee every time an individual takes one of its training lessons. Fourth, companies can also be charged a fee every time an individual runs a report regarding one of its training lessons. Such fees would be accumulated for each company in the learning community and maintained in a database for periodic payment by the companies. Such fee databases are developed and maintained with the aid of commercial database software such as, for example, Microsoft SQL, etc., using techniques well known to those of ordinary skill in the art. Of course, there are many ways in which these methods of revenue generation could be varied without departing from the scope of the present invention.

Those of ordinary skill in the art will understand that the above discussions of the present invention are merely exemplary and do not otherwise limit the scope of the appended claims. Those of ordinary skill in the art will understand that other software training solutions other than those referenced above may be used to create a learning community for distributing training materials via a computer network, and to develop training materials for the purpose of such distribution, without departing from the scope of the present invention. Furthermore, those of

ordinary skill in the art will understand that the order of the steps may be altered without departing from the scope of the present invention.

What is claimed is:

1. A computerized method of administering training materials to individuals within a company through a communication network which comprises the steps of:
  - (a) forming a community made up of a plurality of companies having access to shared training materials;
  - (b) regulating the access of individual companies within the community to said shared training materials;
  - (c) assigning user rights to one or more individuals within said companies; and
  - (d) distributing shared training materials to one or more of said individuals wherein access by said individual to said shared training materials is determined by his user rights.
2. The method of claim 1 wherein any of said companies may add additional training materials to said shared training materials.
- 15 3. The method of claim 1 which further comprises permitting new companies to be added to the community and establishing one or more community administrators to regulate the addition of new companies to the community.
4. The method of claim 1 which further comprises assigning a company administrator for each company within the community.
- 20 5. The method of claim 4 which further comprises having said company administrator determine the user rights of individuals within the company to which the company administrator is assigned.
- 25 6. The method of claim 4 which further comprises having said company administrator assign each individual within the company to which the company administrator is assigned to a level in the company hierarchy.
7. The method of claim 6, wherein having said company administrator assign each individual to a 30 level within said company hierarchy automatically establishes that individual's user rights.
8. The method of claim 6 or 7, wherein said company hierarchy comprises one or more divisions, regions, sites, departments or ad-hoc groups.

9. The method of claim 8 wherein an individual may be assigned to more than one division, region, site, department or ad-hoc group within the same company.
- 5      10. The method of claim 8 wherein an individual may be assigned to more than one division, region, site, department or ad-hoc groups within different companies.
- 10     11. The method of claim 1, wherein comments may be added to said shared training materials, and wherein access to said comments may be restricted to individuals within a particular company and in accordance with said user rights.
12. The method of claim 1, wherein said shared training materials include training lessons and wherein such training lessons are designated as mandatory or voluntary.
- 15     13. The method of claim 12 wherein a company assigning to an individual a training lesson designated as voluntary may not access information regarding said individual's completion of or performance on said training lesson.
- 20     14. The method of claim 12 which further comprises establishing an off-the-clock budget for mandatory training lessons for one or more individuals.
15. The method of claim 14, wherein an individual who has exceeded his off-the-clock budget may not access mandatory training lessons unless his off-the-clock budget is increased.
- 25     16. The method of claim 14 which further comprises notifying an individual in accordance with said user rights that an individual has exceeded his off-the-clock budget.
- 30     17. The method of claim 14 which further comprises accumulating in a database the amount of off-the-clock time spent by an individual on an assigning company's mandatory training lessons and the resulting wage liability incurred by said assigning company.
18. The method of claim 1 which further comprises providing incentives to one or more individuals as a function of each individual's performance on one or more training lessons.

19. The method of claim 13 which further comprises generating revenue by requiring each company to pay a fee for each training lesson it assigns to an individual within the company.
- 5     20. A method of operating a computer system comprising a data processor coupled to a data storage means in order to provide training materials to an individual within a company, the individual being assigned to a particular level within the company and having a training history including the results of one or more training exams, the method comprising the steps of:
- 10       (a) recording in the data storage means information relating to the individual's training history;
- (b) recording in the data storage means information relating to the individual's level within the company; and
- (c) computing, based on the individual's training history and on the individual's level within the company, whether to grant access to training materials to said individual.
- 15     21. The method according to claim 20, wherein said training materials include exam questions and wherein the method further comprises recording the individual's responses to exam questions; grading the individual's responses to said exam questions; and updating the information relating to the individual's training history based on the grade received by the individual.
- 20     22. The method according to claim 21 which further comprises generating reports for an individual which are based on said individual's updated training history.
- 25     23. The method according to claim 22, wherein each individual can prevent a company from generating reports based on the individual's training history unless said history pertains to performance on exams for training lessons developed or assigned by said company.
- 30     24. The method according to claim 22, wherein said training history includes the number of items of particular products sold by said individual.
25. The method according to claim 24 which further comprises periodically awarding spiffs to said individuals in accordance with the type and number of products sold.
26. A computer system for administering shared training materials to individuals within a company, the system comprising:

- (a) communication means for providing communication among companies having access to said shared training materials;
- (b) assignment means for assigning to individuals within said companies user rights controlling their access to shared training materials; and
- 5 (c) distribution means for distributing to said individuals various said shared training materials based on their user rights.

27. The system of claim 26 which further comprises publishing means for adding additional training materials to said shared training materials.

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28. The system of claim 27, wherein said additional training materials may be added by any of said companies having access to said shared training materials.

15

29. The system of claim 26, wherein said assignment means comprises means for establishing a company hierarchy to which individuals are assigned.

30. The system of claim 29, wherein said company hierarchy comprises one or more divisions, regions, sites, departments or ad-hoc groups.

20

31. The system of claim 29 or 30, wherein comments may be added to said shared training materials in accordance with said user rights, and wherein access to said comments may be restricted in accordance with said user rights.

32. A computer readable media for instructing a computer to perform the steps of:

25

(a) forming a community made up of a plurality of companies having access to shared training materials;

(b) regulating the access of individual companies within the community to said shared training materials;

(c) assigning user rights to one or more individuals within said companies; and

30

(d) distributing training materials to one or more of said individuals wherein access by an individual to said training materials is determined by his user rights.

33. A computerized method for permitting an individual within a company to access training materials, wherein said access depends on the individual's level within the company, and wherein

said training materials are shared with other companies in a shared network, the method comprising the steps of:

(a) recording in a data storage device rules pertaining to said company's right of access to said training materials in said shared network;

5 (b) recording in a data storage device a set of rules pertaining to the rights of one or more individuals within said company to access said training materials on said shared network; and  
(c) determining, based on a request for access to said training materials by an individual within said company, whether to grant the requested access based on said rules pertaining to said company's rights and said rules pertaining to said individual's rights.

10

34. A computer system for providing training lessons to an individual within a company, the system comprising at least one data storage device containing information about the individual's level within the company and containing one or more training lessons, and a computing device coupled to the data storage device for determining, based on a request by the individual, whether 15 to grant the individual access to said training lessons based on the individual's level within the company.

35. A computerized method for a wholesaler of goods to determine the relative performance of two or more vendors of the goods, wherein said vendors and said wholesaler are members of a learning community and wherein said learning community distributes training materials relating to the wholesaler's goods and wherein the learning community provides access to the training history in exams relating to the wholesaler's goods of individuals associated with the vendor, the system comprising of:

(a) means for the wholesaler to access the training history of a least one individual associated with 25 a first vendor of the wholesaler's goods in order to determine the performance of said individual on exams relating to the wholesaler's goods;

(b) means for the wholesaler to access the training history of at least one individual associated with a second vendor of the goods in order to determine the performance of said individual on exams relating to said goods; and

30 (c) means for the wholesaler to compare the relative performance of the vendors on the basis of their individual's training history concerning said goods.

36. A computerized method of administering training materials to individuals within a company which comprises the steps of:

- (a) forming a community made up of a plurality of companies having access to shared training materials;
  - (b) regulating the access of individual companies within the community to said shared training materials; and
- 5       (c) having at least one of said companies regulate the access of individuals within the company to the training materials to which the company has access.

37. A computerized method of administering training materials to individuals within a company which comprises the steps of:

- 10     (a) forming a community made up of a plurality of companies having access to shared training materials;
- (b) establishing a community administrator to regulate the addition of new companies to the community;
- (c) establishing a company administrator for each company within the community;
- 15     (d) having at least one developer develop training lessons;
- (e) having said developer select which companies within the community have access to the training materials developed by said developer and having said developer transfer said materials to a computer network accessible by selected companies within said community;
- (f) having said company administrator determine the user rights of individuals within the company administrator's company;
- 20     (g) distributing shared training materials to one or more of said individuals wherein access by said individual to said shared training materials is determined by his user rights; and
- (h) generating revenue by requiring said developer to pay a fee for training material it develops and transfers to said network.

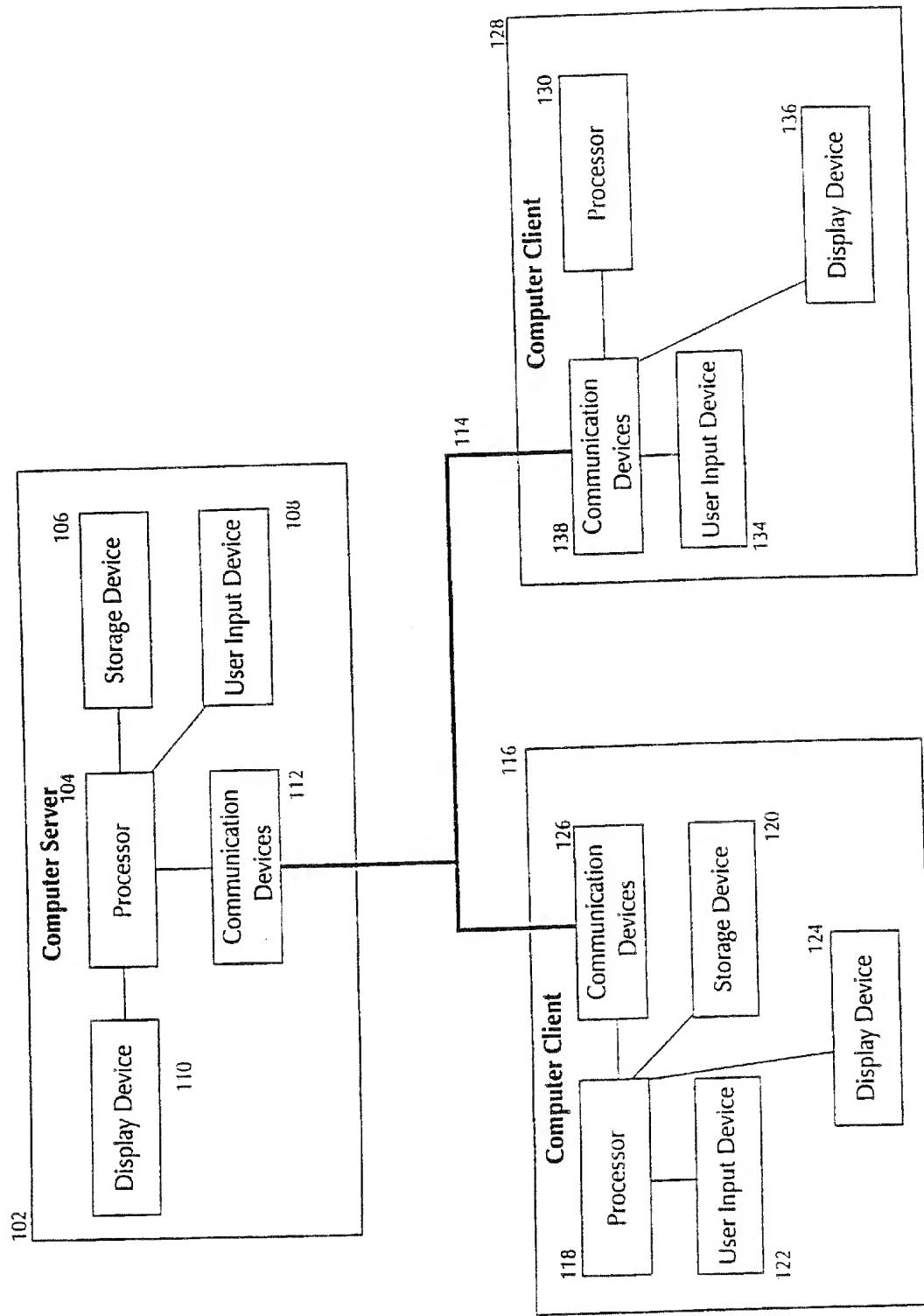


FIG. 1

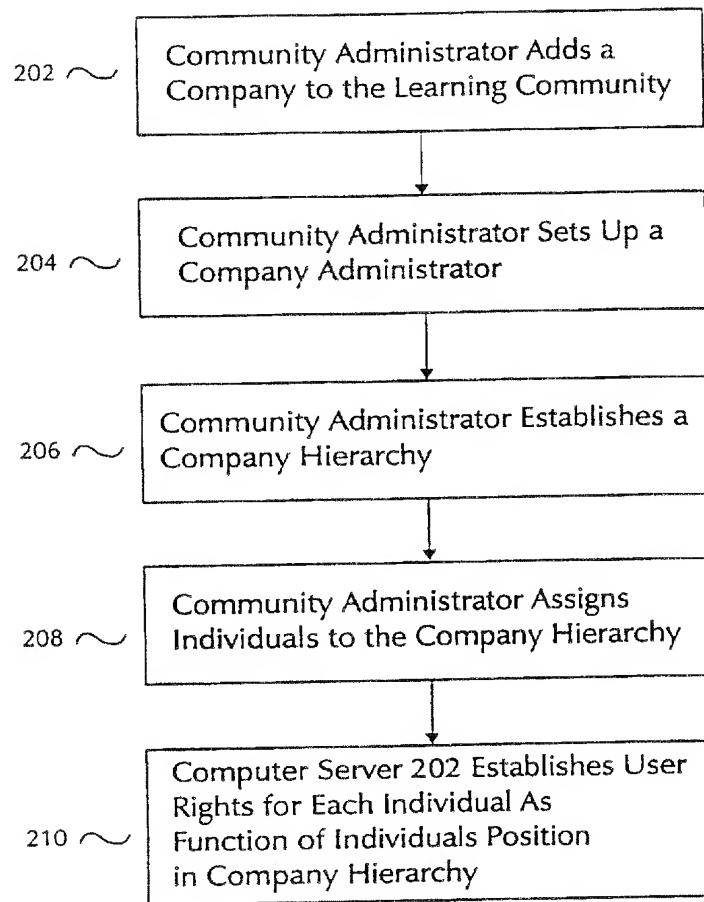


FIG. 2

User Rights	Community Administrator	Company Administrator	Manager	Employee
Run reports*†	X	X	X	X
Develop training lessons ^	X	X	X	X
Create & Activate incentives for completing issues	X	X		
Set-up new company administrators	X			
Set-up new managers*	X	X	X	
Set-up new employees*	X	X	X	
Grant developer rights to users	X	X		
Grant reporting rights to users*	X	X	X	
Enter & edit company news	X	X		
Add company to learning community	X			
Establish company hierarchy	X	X		
Add training lesson to company curriculum	X	X		
Add & edit corporate-wide comments	X	X		
Make training lesson compensable for “off-the clock” training	X	X		
Add & edit assignment-specific comments	X	X	X	
Define ad hoc groups	X	X		
Assign individuals to company hierarchy	X	X		
Assign training lessons*	X	X	X	
Access training lessons	X	X	X	X
Set “off-the clock” training budgets for each user*	X	X	X	

\* Only at their level or lower in company hierarchy.

† Only if granted by someone at their level or higher in the corporate hierarchy.

^ Only if granted by an administrator. Note that developed training lessons are not automatically added to the corporate curriculum — they must be added to the corporate curriculum by an administrator.

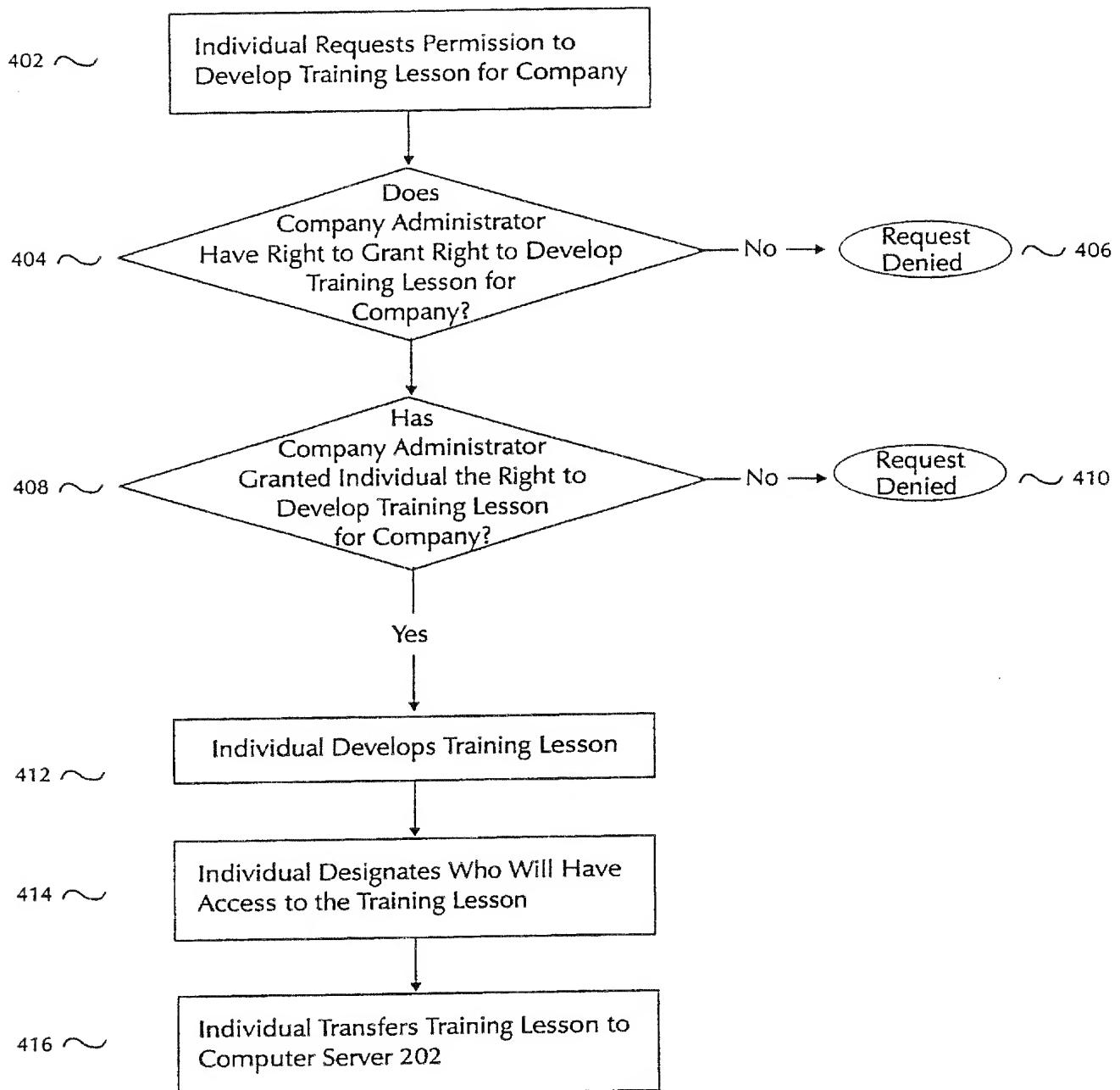


FIG. 4

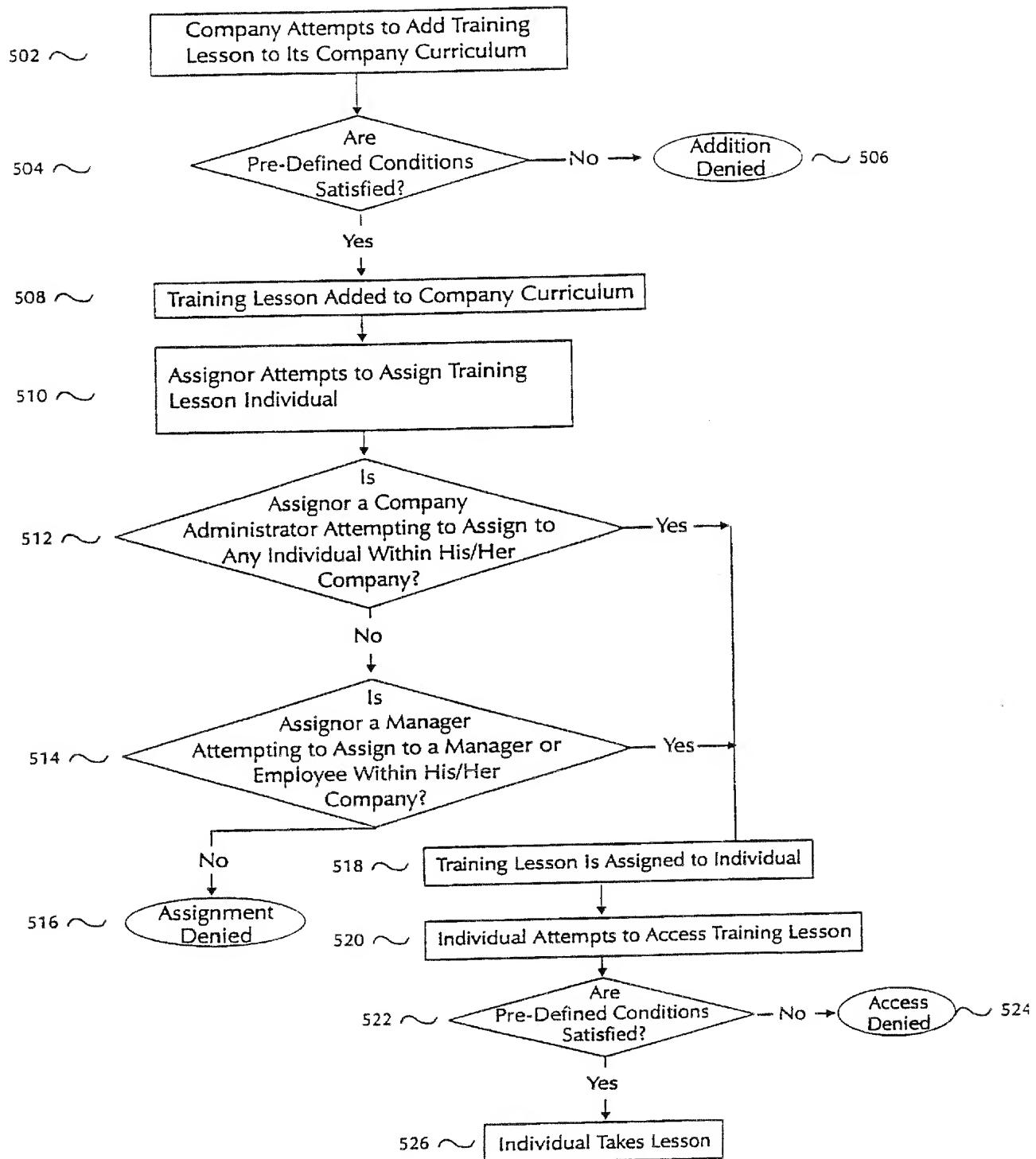


FIG. 5

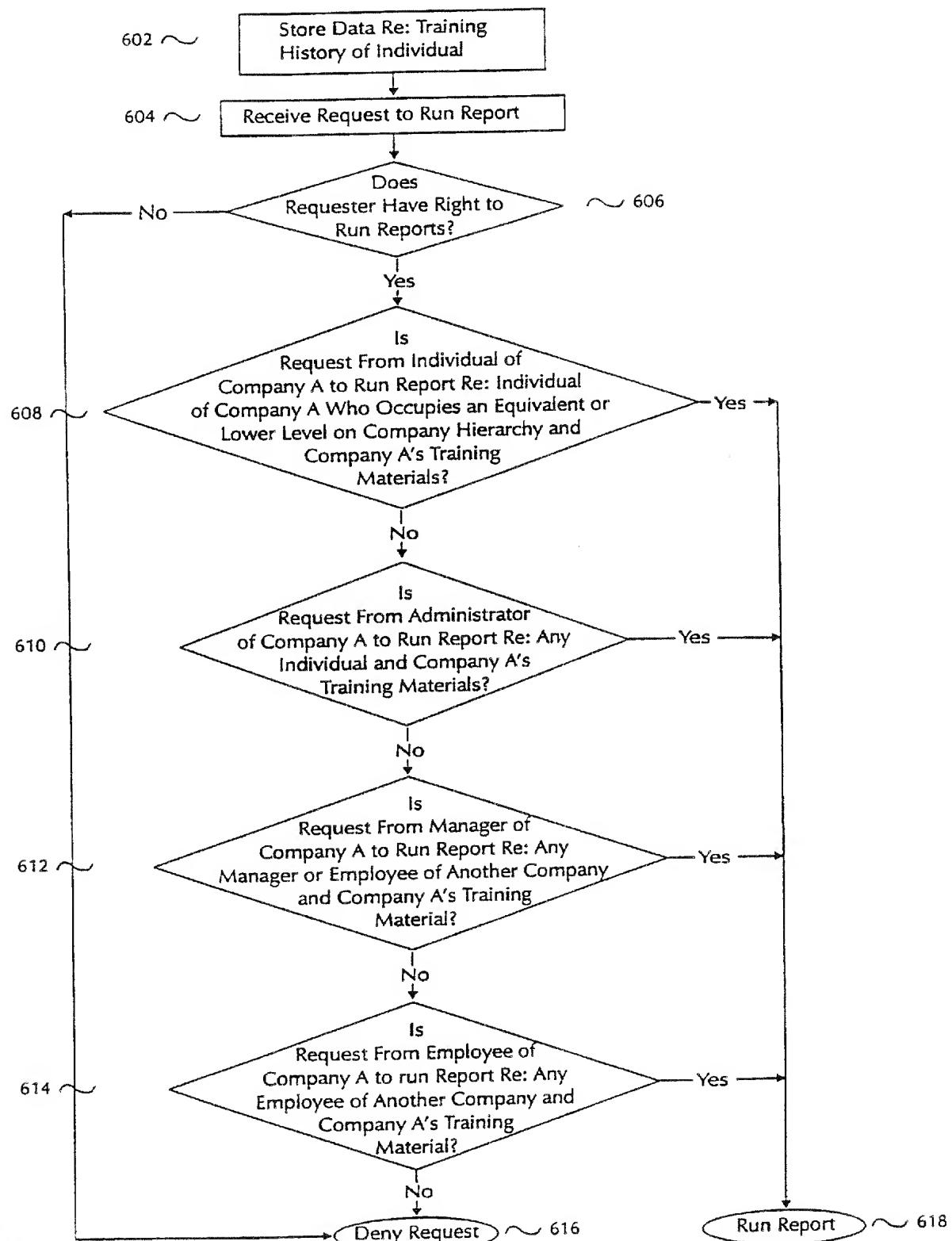


FIG. 6